

Session 4: Introduction to OCLC Cataloging

- What is OCLC?
- Connexion Browser vs. Connexion Client
- Navigate the Client version
 - Searching
 - Editing
 - *Accessing Bibliographic Formats and Standards*
 - Exporting



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This is a brief introduction to OCLC. In this session you will learn what OCLC is, and a little bit about the Browser and Client versions of OCLC Connexion. We will navigate the Client version and talk about searching for bibliographic records and then about editing those records. We will see how to access Bibliographic Formats and Standards, and our options for exporting records.

What is OCLC?

- OCLC (Online Computer Library Center)
- A non-profit organization
- A bibliographic utility with over 64 million records which enables you to perform these cataloging functions:
 - Search for bibliographic records
 - Edit bibliographic records before you download them into your local database
 - Search authority records and export them from OCLC into your local database
 - Access MARC help features with a direct link to *OCLC's Bibliographic Formats and Standards*
 - Report errors in bibliographic records
 - Set your holdings in WorldCat
 - Create or derive new bibliographic records

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WorldCat is just another name for the OCLC catalog. Library users usually search WorldCat through FirstSearch to request materials for interlibrary loan.

OCLC Connexion Browser Version

- Can access through your Internet browser (no need to load any software)
- Updated periodically by OCLC (no need to load updates)
- Cannot work offline
- Can perform operations in batches
- Can save work in online save file
- Can use WebDewey (fee-based)
- Can access MARC field help
- <http://connexion.oclc.org>

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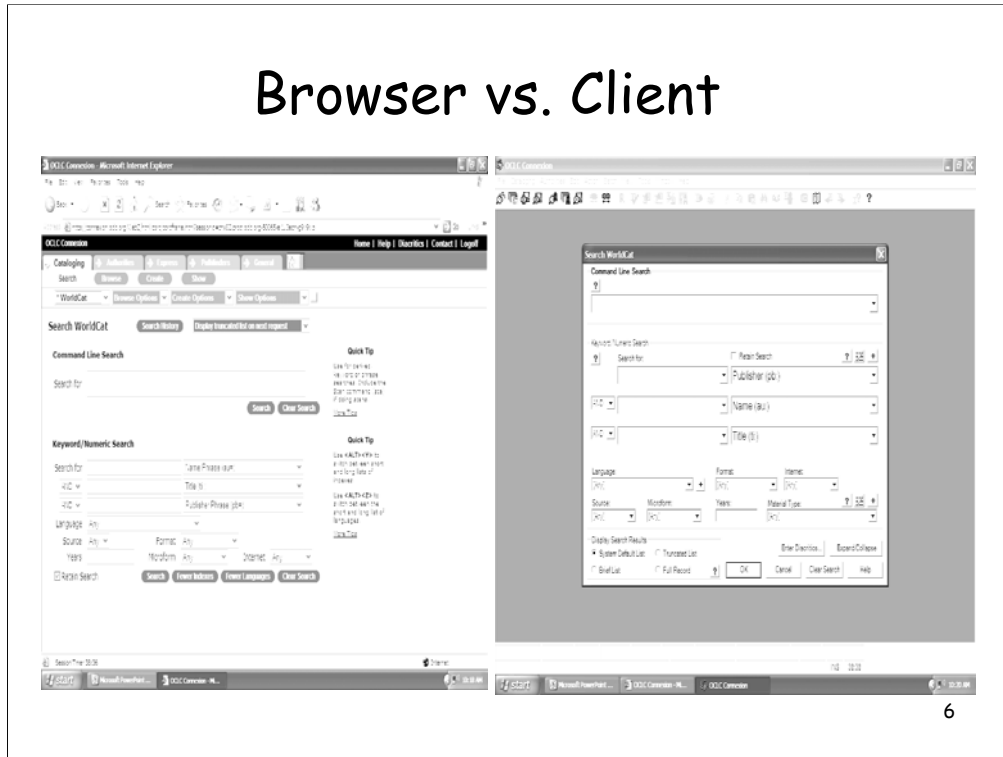
Connexion is OCLC's cataloging software available in both a browser and client version.

OCLC Connexion Client Version

- Software loaded on your computer
- Updated periodically with new releases to load
- Can work offline if desired
- Can perform operations in batches
- Can save work in online or local save file
- Can link to WebDewey
- Can access MARC field help
- <http://www.oclc.org/connexion/default.htm>

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Browser vs. Client



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This screen shows a search screen for the browser version and a search screen for the client version.

Setting Up the Client

- When you load the Client, you can do some customization. These options are available under Tools. Some of the options are:
 - Printing
 - Record display
 - Authorizations
 - Derive record
 - Export
 - Font [prefer Ariel unicode or Ariel unicode MS]
 - etc.

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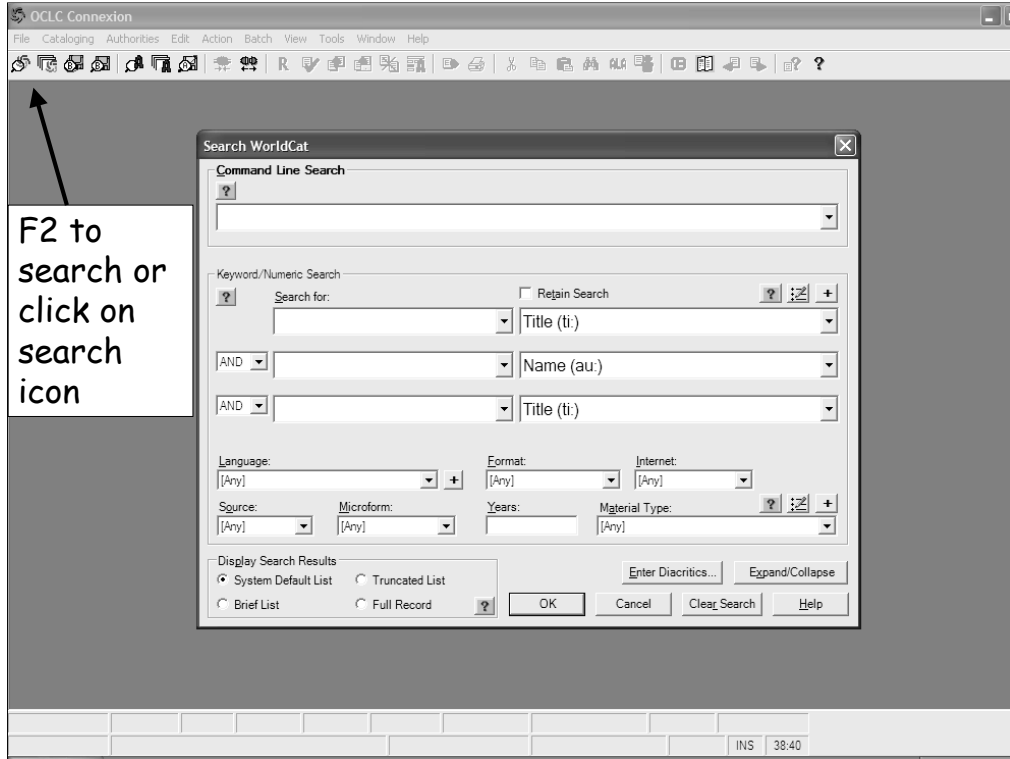
We will be concentrating on the Client version for the rest of this presentation.

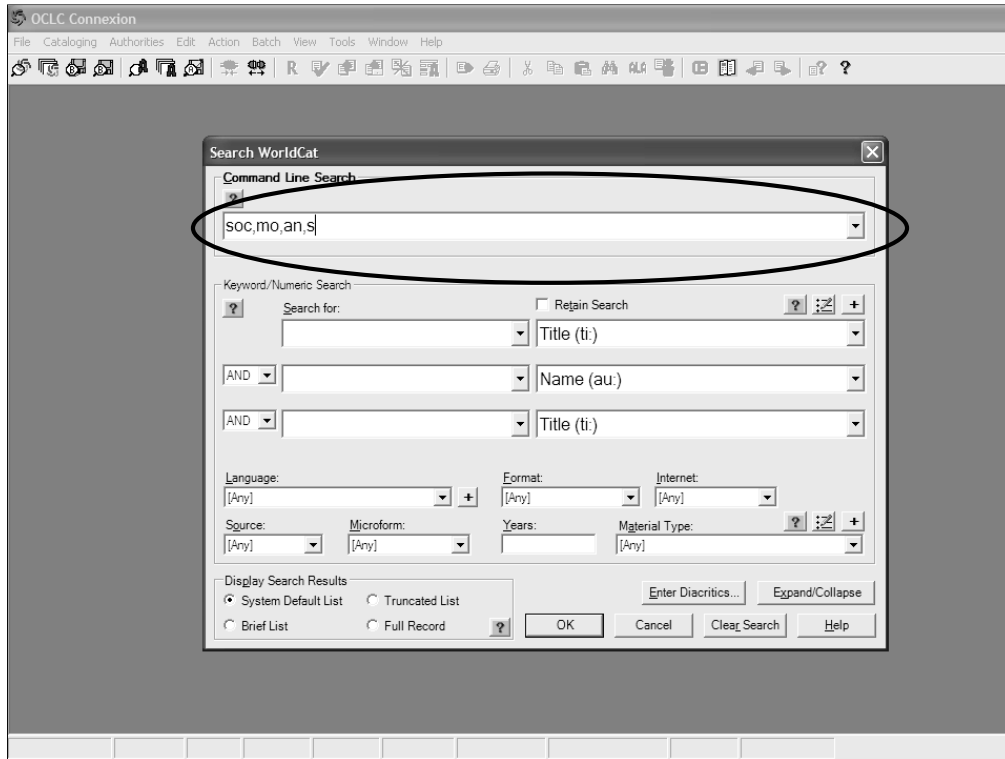
You may have to get your authorization number and password from your supervisor.

Searching in Client

- Command line
- Keyword
- Numeric
- Limit by
 - Date
 - Format
 - Language
 - Etc.

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If you are familiar with command line searching, you can type the search into the box at the top. We are looking at a search for “Social Movements and Social Change” (3,2,2,1) Veteran OCLC searchers probably prefer this method of searching.

Command Line Searching

3,2,2,1 Title
4,4 Name/Title
4,3,1 Personal name (First, Last,
Middle)
=4,3,1 Corporate name

ISBN or ISSN can be typed into
command line search box with no spaces
or dashes

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These are only a few of the command line search options.

Command Line Searching (cont.)

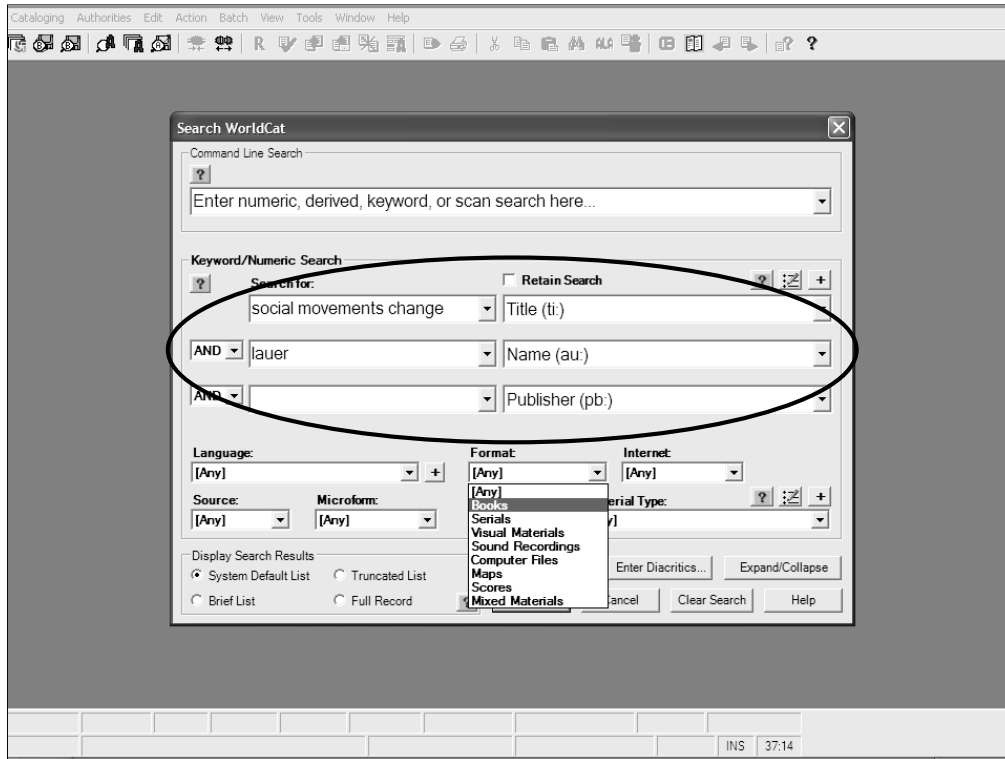
Gone with the Wind by Margaret Mitchell
could be searched:

gon,wi,th,w OR

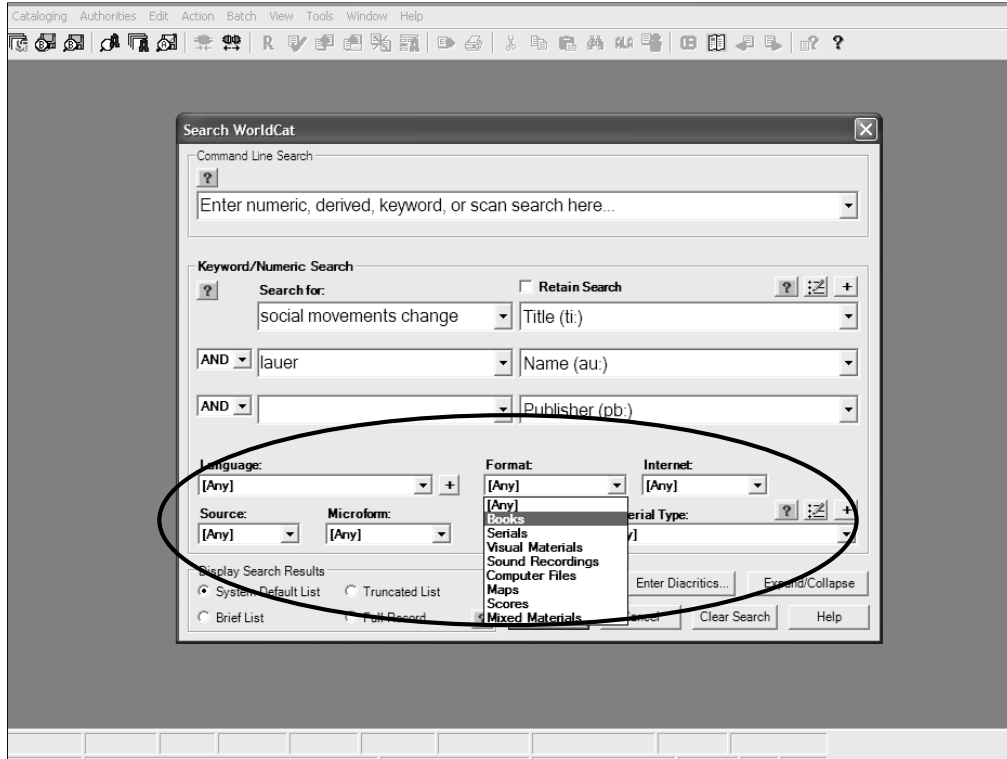
mitc,gone OR

mitc,mar,

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We can also use the keyword/numeric search boxes in the center of the screen. New OCLC searchers may prefer this method.



We can limit the keyword search by format, language, source, material type, etc.

OCLC Connexion - [Online WorldCat: Social movements and social change]

File Cataloging Authorities Edit Action Batch View Tools Window Help

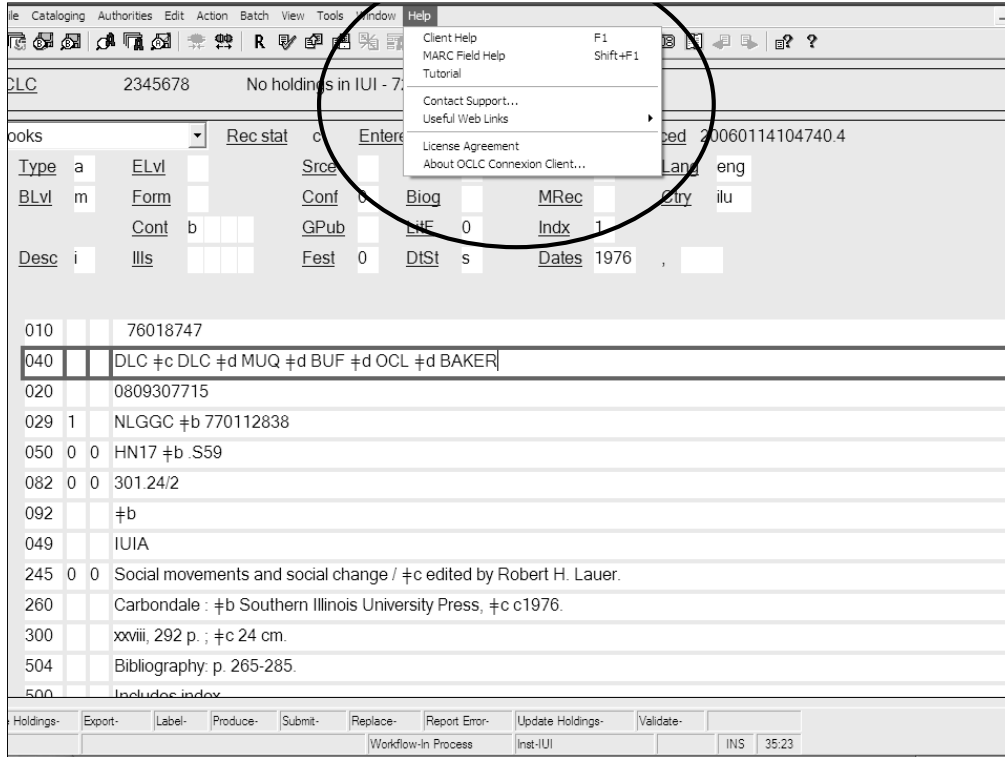
OCLC 2345678 No holdings in IUI - 726 other holdings

Books		Rec stat	c	Entered	19760714	Replaced	20060114104740.4
Type	a	ELvl		Srcr		Audn	
Ctrl		Lang	eng				
BLvl	m	Form		Conf	0	Biog	
		Cont	b	GPub		LitF	0
						Indx	1
Desc	i	Ills		Fest	0	DtSt	s
						Dates	1976 ,
010			76018747				
040			DLC †c DLC †d MUQ †d BUF †d OCL †d BAKER				
020			0809307715				
029	1		NLGGC †b 770112838				
050	0 0		HN17 †b .S59				
082	0 0		301.24/2				
092			†b				
049			IUIA				
245	0 0		Social movements and social change / †c edited by Robert H. Lauer.				
260			Carbondale : †b Southern Illinois University Press, †c c1976.				
300			xxviii, 292 p. ; †c 24 cm.				
504			Bibliography p. 265-285.				
500			Includes index.				

Delete Holdings- Export- Label- Produce- Submit- Replace- Report Error- Update Holdings- Validate-

Workflow-In Process Inst-IUI INS 38:33

This is a bibliographic record in OCLC.



A great feature in OCLC is the ability to link to help screens.

If I clicked on the 245 tag and chose the Help menu and then clicked on MARC field help, it would take me directly to the 245 in Bibliographic Formats and Standards.

I can also click on elements of the fixed field for help screens.

The screenshot shows the OCLC Bibliographic Formats and Standards website. The main heading is "245 Title Statement (NR)". Below this, there are sections for "Input Standards" and "Subfields".

Input Standards

Mandatory/Mandatory	1st Indicator Title added entry	
	0 No added entry	
	1 Added entry	
	2nd Indicator Nonfiling characters	
	0 No nonfiling characters	
	1-9 Number of nonfiling characters present	

Subfields
(R=Repeatable NR=Nonrepeatable)

1a Title (NR)	Input Standards
	Mandatory/Mandatory
	MIX: Required if applicable/Required if applicable
	Required if applicable/Required if applicable
	SER: Optional/Optional
	Required if applicable/Required if applicable
	Required if applicable/Required if applicable
	Optional/Optional
	Required if applicable/Required if applicable
	Required if applicable/Required if applicable
	Required if applicable/Required if applicable

Subfields

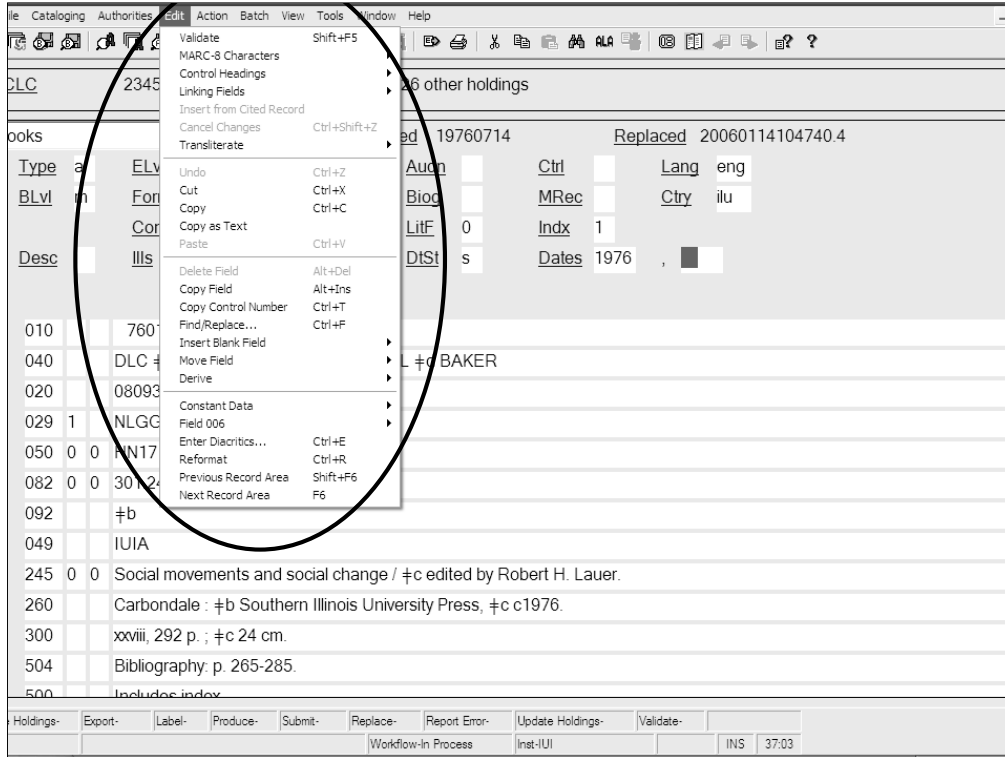
1b Remainder of title (NR)	
1c Statement of responsibility, etc. (NR)	
1f Inclusive dates (NR)	
1g Bulk dates (NR)	
1h Medium (NR)	
1k Form (R)	
1n Number of part/section of a work (R)	
1p Name of part/section of a work (R)	
1s Version (NR)	

Definition

BKS, SER, VIS, The title and statement of responsibility. Field 245 consists of the title
MAR, SER, REC, 245 and 245 also contain the general material designation

This can help you decide which indicators should be used and the correct subfields along with the proper punctuation. Lots of examples.

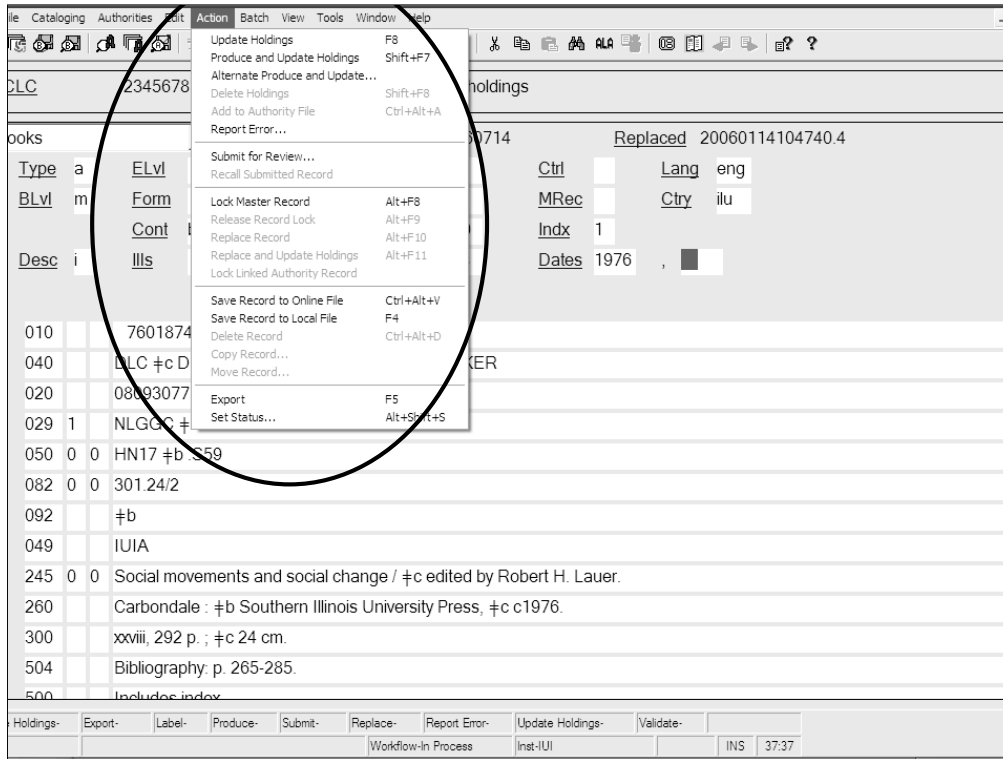
Define repeatable (R) & not repeatable (NR)



Each pull down menu contains your options plus the short cut keys you can use in place of using menus.

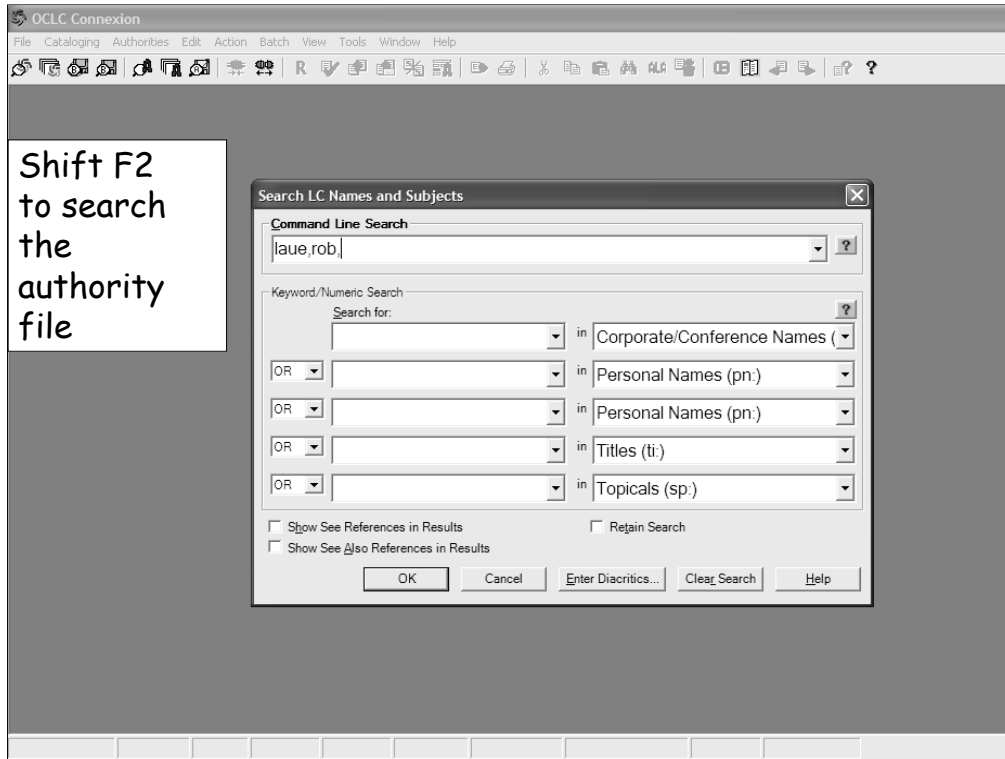
You can edit bibliographic records before loading them into your local database without making changes to the master record. The specific kinds of changes to make will be discussed in another section.

Validate will only check for errors in coding on the bib record but it can't check everything like cataloging rules.



Final actions can be taken when you are finished editing the record. Notice that F5 or choosing export on the action menu is one way to export a record.

Can do any action several different ways, including organizing the menu bar for more direct access to an action. Can really be tailored to each person's preference.



DLC Connexion - [Online LC Authority File: Lauer, Robert H.]

File Cataloging Authorities Edit Action Batch View Tools Window Help

ARN 460829

Recstat	n	Entered	19801014	Replaced	19840322000000.0
Type	z	Upd status	a	Enclvl	n
Roman	l	Ref status	n	Mod rec	
Govt aqn	l	Auth status	a	Subj	a
Series	n	Auth/ref	a	Geo subd	n
Ser num	n	Name	a	Subdiv tp	n
				Source	
				Name use	a
				Subi use	a
				Ser use	b
				Rules	c

010		00078512
040		DLC lb eng lc DAC
100	1	Lauer, Robert H.
670		His Perspectives on social change, 1973.
678		Southern Ill. Univ., Edwardsville; la Ph.D., la b. 6/28/33

Export Add Submit Replace Report Error Validate

Workflow-In Process Inst:HQ INS 38:54

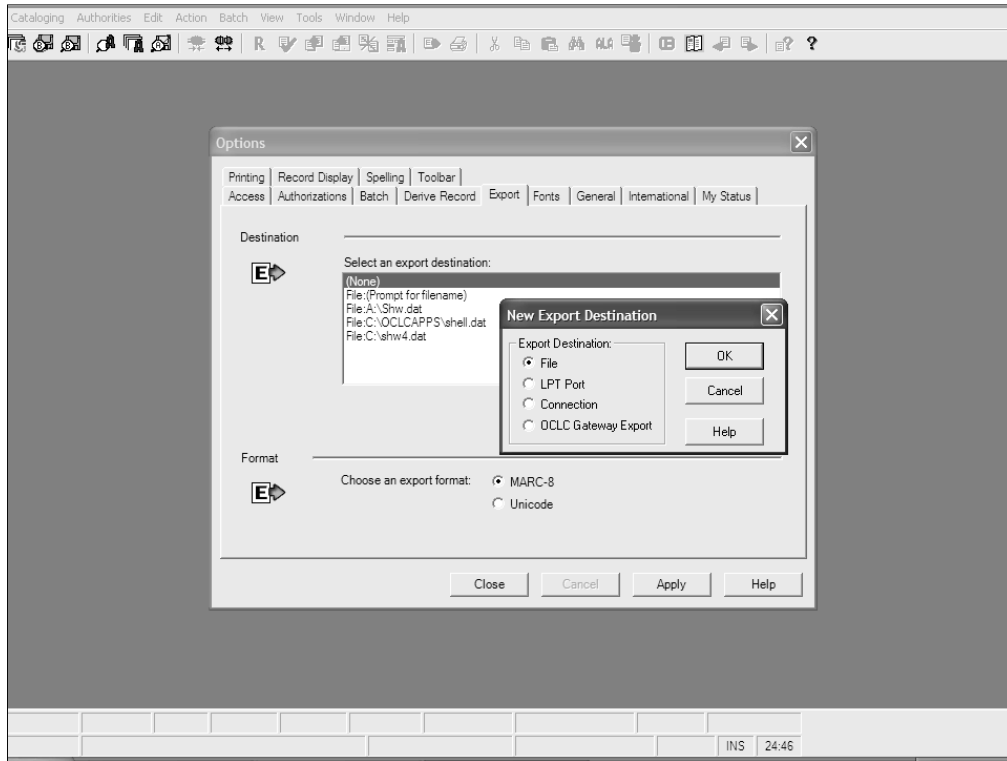


Export Bibliographic Records to Local Database

- Find a matching bibliographic record
- Edit the record (make necessary changes in coding, punctuation, etc.)
 - Check MARC help screens if needed
- Check authority file & control headings
- Export

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Controlling headings means linking the names and subjects to matching authority records. If a heading is controlled, and the subject heading is later changed, each bibliographic record that is linked to that authority record would be changed when the authority record is changed.



OCLC Original Cataloging

If there is no matching record in OCLC, you can create an original record using a work form or by deriving an original record from an existing record

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Or you use constant data

OCLC Connexion - [Bibliographic Workform: Books]

File Cataloging Authorities Edit Action Batch View Tools Window Help

OCLC NEW

Books Rec stat n Entered 20060225 Replaced 20060225

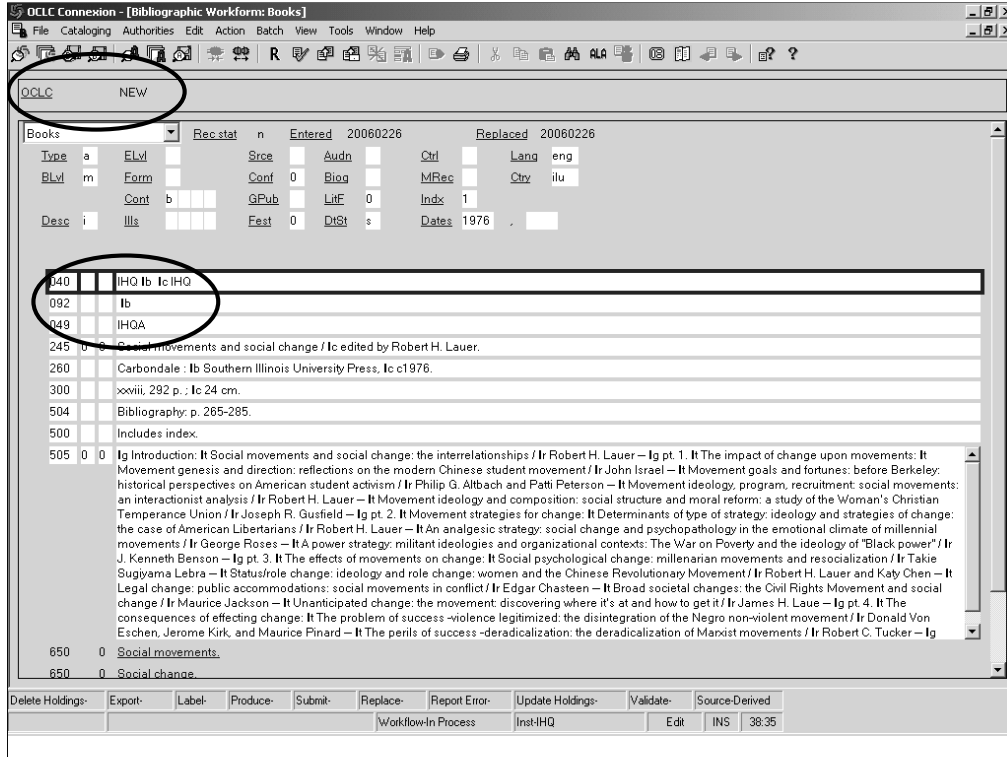
Type	a	ELvl	0	Srcd	d	Audn		Ctrl		Lang	000
BLvl	m	Form		Conf	0	Biog		MRec		Ctry	000
		Cont		GPub		LitF	0	Indx	0		
Desc	0	Ills		Fest	0	DtSt	0	Dates	0000	,	

010			
040		IUI	‡b ‡c IUI
020			
041	0		‡h ‡b
050	0 0		‡b
092			‡b
049		IUIA	
100	0		
245	0 0		‡h ‡b ‡c
246	0 0		
250			
260			‡b ‡c
300			‡b ‡c

Delete Holdings- Export- Label- Produce- Submit- Replace- Report Error- Update Holdings- Validate- Source-Workform
Workflow-In Process Inst-IUI INS 31:10

start Cataloging Boot Camp Microsoft PowerPoint ... OCLC Connexion - [B... 7:14 PM

This is the original cataloging work form for a book.



Or, you can derive a new record from an existing OCLC record especially if you have a new edition and most fields are already what you need for the new record. You still have to go through every tag on the record but it may save lots of typing.

Resources/Tutorials

- Connexion Browser Documentation
<http://www.oclc.org/support/documentation/connexion/browser/>
- Connexion Client Documentation
<http://www.oclc.org/support/documentation/connexion/client/default.htm>
- OCLC Librarian's Toolbox
<http://www.oclc.org/toolbox/default.htm>
- OCLC Connexion Tutorials
<http://www.oclc.org/support/training/connexion/default.htm>



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Resources/Tutorials (cont.)

ILLINET/OCLC: 1-217-785-1532

OCLC Help Desk: 1-800-848-5878

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